

DALLAS ESTATE PLANNING COUNCIL

P.O. Box 38553, Dallas, TX 75238 Phone: 214-340-8020
E-Mail: dallasepc@yahoo.com Website: www.dallasepc.org

2023-2024 **INDIVIDUAL** MEMBERSHIP ENROLLMENT FORM (June 1, 2023-May 31, 2024 – *Dues are Non-Transferable and Not Pro-Rated*)

FOR NEW MEMBERS: To pay by credit card, please submit the completed printed membership form via email to dallasepc@yahoo.com and then go to the website, click on the drop-down menu "membership" and then "member renewal".

Name _____

Firm Name _____

Firm Address _____

City _____ State _____ Zip _____ Phone _____

E-mail _____ (*please print clearly*)

NOTE: Email address is required for communication purposes

NEW MEMBER: I was referred by _____

Discipline you **CURRENTLY PRACTICE:**
(CHOOSE ONLY ONE)

Designations (*check all that apply*):

___ Attorney Bar Card No. _____

___ JD

___ AEP

___ Certified Public Accountant

___ CPA

___ CAP

___ Financial Planner (check CFP or ChFC)

(MUST be CFP or ChFC)

___ CFP

___ ChFC

___ Life Insurance (check CLU or Finseca)

___ CLU

___ Finseca Member

(MUST be Chartered Life Underwriter or Finseca member)

___ Trust Management

___ CTFA

___ Associated Professionals: Designation: _____

Years of Experience in **CURRENT** discipline: ___ Less than 5 ___ 5-10 ___ 10-20 ___ 20+

Check all that apply:

Annual Dues (REQUIRED)

___ \$ 95

[DOES NOT INCLUDE PROGRAM/MEAL COST FOR MEETINGS]

Patron Fee (OPTIONAL)

___ \$350

(includes link -does not include dues – membership dues required)

Website link (for Patron): _____

TOTAL ENCLOSED

\$ _____

Please complete this enrollment form, include your check (or pay by credit card online after submitting form to dallasepc@yahoo.com) for the appropriate amount and mail to the Dallas Estate Planning Council, P. O. Box 38553, Dallas, TX 75238.

For more info on Patron Fee, go to www.dallasepc.org, click on "About Us", scroll to "Patron".

If your organization is interested in sponsoring a meeting or social event please go to www.dallasepc.org, click on "About Us", scroll down to "Sponsor" and read the sponsor information. Please contact Teresa Moore, Executive Director, dallasepc@yahoo.com if you would like to sponsor.

NAEPC: To receive additional email communications from NAEPC (2-3 webinars, 4-6 conference, 1 per quarter Journal, plus NAEPC news) opt-in: http://www.naepc.org/about/contact/mailling_list